

# **AARP Tax Aide Recruitment Web System User Manual**

**Version 1.0**

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## 1.0 Login to the Recruitment (internet)

Go to the following location: <https://volunteers.aarp.org/taxaide/internet/> the below screen (Screen 1) will be displayed.

Screen 1:

**Registered Already?**

Enter the email address and password you selected during registration to access Tax Aide Prospect Volunteer data

Email Address:

Password:

(password must contain minimum 6 characters)

**LOG IN**

[forgot password?](#)

**New User**

Please register in order to access Tax Aide Prospect Volunteer data

**Register**

**If Registered Already:** Enter valid email address and password in the login window.  
Note: please use the same email address and password created in the registration process.

## Screen 2:



Logged in as: Ronica Krishnan | [Log out](#)

### CONFIDENTIALITY AND PRIVACY POLICY

In accordance with AARP policy, use of this application and data is restricted. Only AARP Tax Aide volunteers and other system users who have a legitimate job-related need to use VMIS information, files or records are authorized to access such information. It is a violation of AARP Policy to access, use, duplicate, alter, or disclose AARP information for reasons not related to job duties and without appropriate authorization. Use of this system can and may be monitored.

[I AGREE](#)

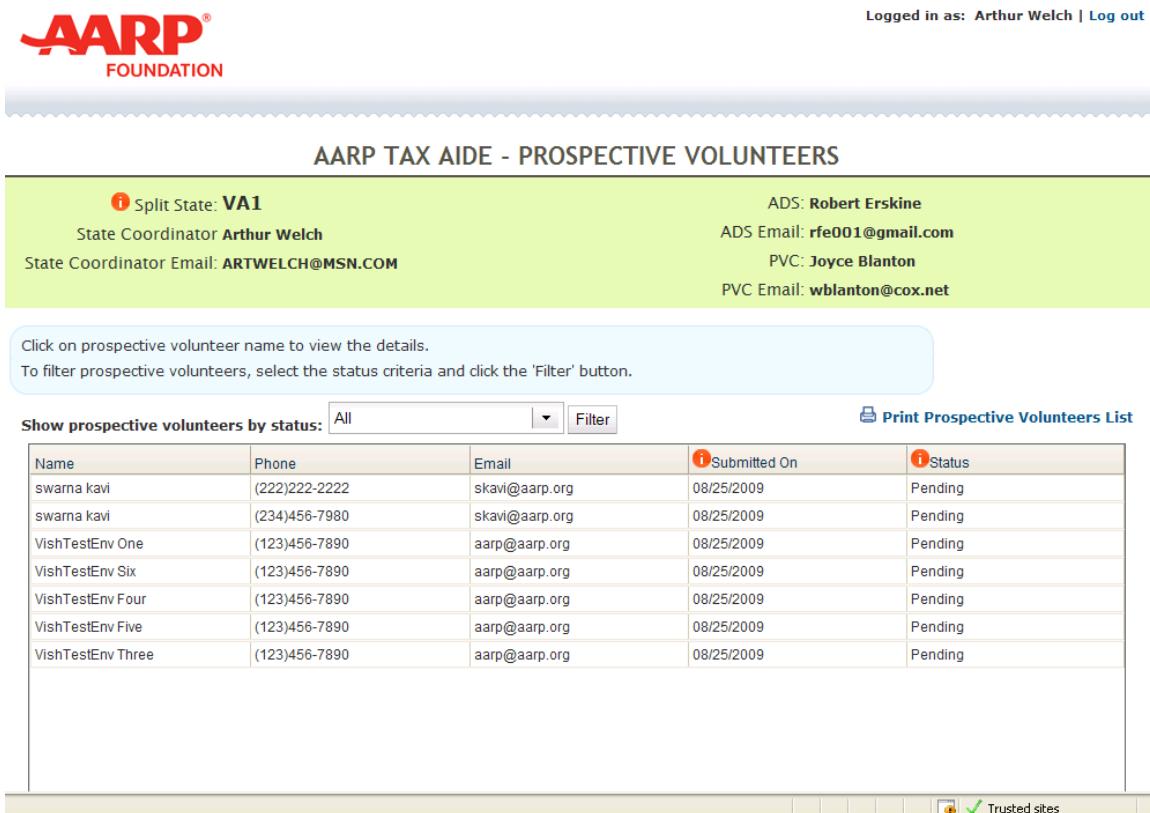
[CANCEL](#)

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Clicking “Cancel” will take the user back to the Login screen. If the user clicks on “I Agree” the following recruitment main page (**Screen 3**) will be displayed:

**Screen 3:**



Logged in as: Arthur Welch | [Log out](#)

**AARP TAX AIDE - PROSPECTIVE VOLUNTEERS**

**i** Split State: **VA1**

State Coordinator **Arthur Welch**  
State Coordinator Email: **ARTWELCH@MSN.COM**

ADS: **Robert Erskine**  
ADS Email: **rfe001@gmail.com**

PVC: **Joyce Blanton**  
PVC Email: **wblanton@cox.net**

Click on prospective volunteer name to view the details.  
To filter prospective volunteers, select the status criteria and click the 'Filter' button.

Show prospective volunteers by status: **All** [Filter](#) [Print Prospective Volunteers List](#)

Name	Phone	Email	Submitted On	Status
swarna kavi	(222)222-2222	skavi@aarp.org	08/25/2009	Pending
swarna kavi	(234)456-7980	skavi@aarp.org	08/25/2009	Pending
VishTestEnv One	(123)456-7890	aarp@aarp.org	08/25/2009	Pending
VishTestEnv Six	(123)456-7890	aarp@aarp.org	08/25/2009	Pending
VishTestEnv Four	(123)456-7890	aarp@aarp.org	08/25/2009	Pending
VishTestEnv Five	(123)456-7890	aarp@aarp.org	08/25/2009	Pending
VishTestEnv Three	(123)456-7890	aarp@aarp.org	08/25/2009	Pending

## 2.0 Volunteer Registration to access Recruitment (internet)

### If not registered:

Go to the following location: <https://volunteers.aarp.org/taxaide/internet/> the below screen (Screen 4) will be displayed.

Please click on “Register” link from the login screen.

### Screen 4:

The screenshot shows the AARP Foundation login page. The AARP logo is at the top left. The page is divided into two main sections: 'Registered Already?' on the left and 'New User' on the right.

**Registered Already?**

Enter the email address and password you selected during registration to access Tax Aide Prospect Volunteer data

Email Address:

Password:

(password must contain minimum 6 characters)

**LOG IN**

[forgot password?](#)

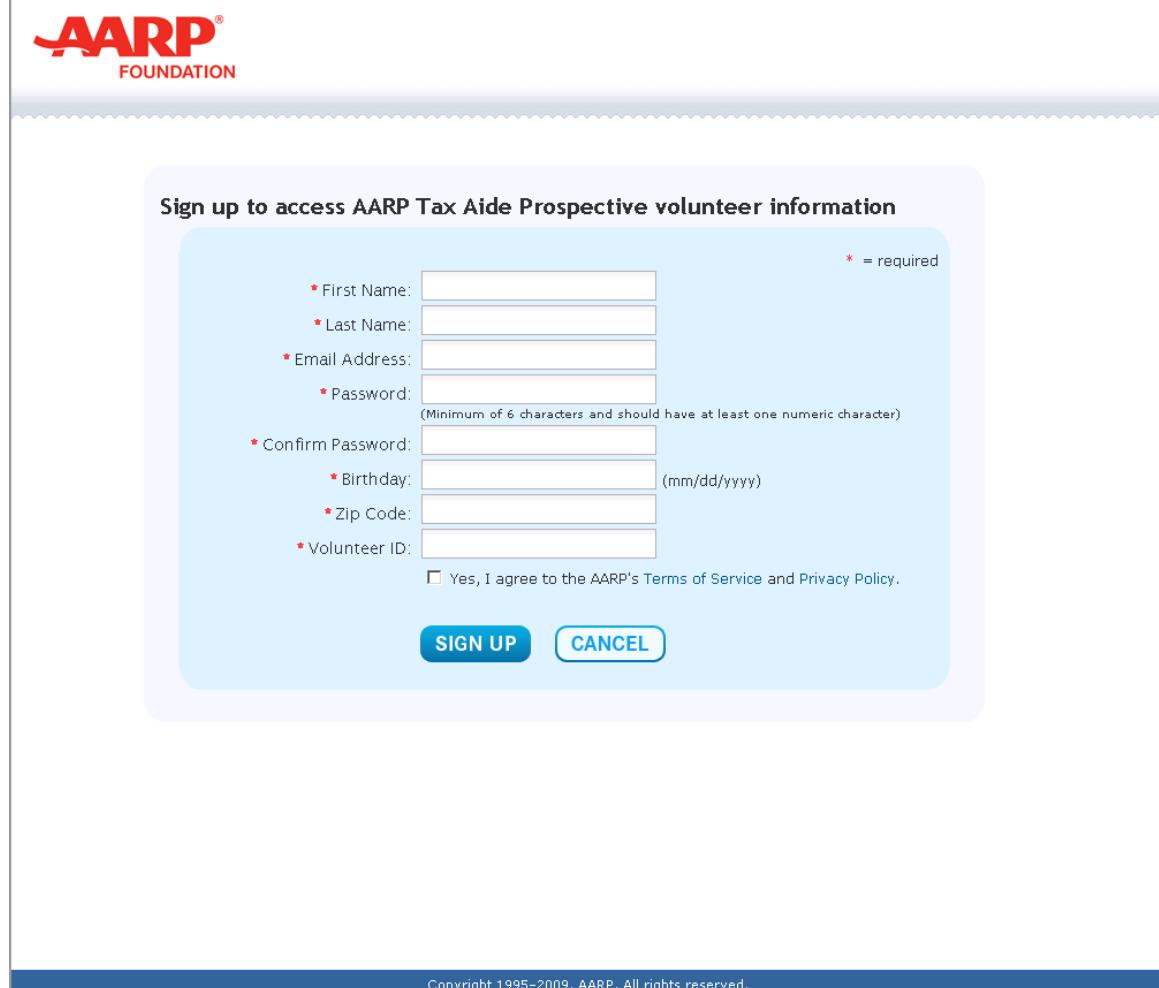
**New User**

Please register in order to access Tax Aide Prospect Volunteer data

**Register**

The below registration screen (Screen 5) is displayed once the Register link is selected

**Screen 5:**



The image shows a registration form for the AARP Tax Aide Prospective volunteer information. The AARP Foundation logo is at the top. The form title is "Sign up to access AARP Tax Aide Prospective volunteer information". It contains fields for First Name, Last Name, Email Address, Password (with a note about minimum 6 characters and one numeric character), Confirm Password, Birthday (format mm/dd/yyyy), Zip Code, and Volunteer ID. A note states that an asterisk (\*) indicates required fields. A checkbox for agreeing to Terms of Service and Privacy Policy is present. Buttons for "SIGN UP" and "CANCEL" are at the bottom. The footer says "Copyright 1995-2009, AARP. All rights reserved."

Sign up to access AARP Tax Aide Prospective volunteer information

\* = required

\* First Name:

\* Last Name:

\* Email Address:

\* Password:   
(Minimum of 6 characters and should have at least one numeric character)

\* Confirm Password:

\* Birthday:  (mm/dd/yyyy)

\* Zip Code:

\* Volunteer ID:

Yes, I agree to the AARP's [Terms of Service](#) and [Privacy Policy](#).

**SIGN UP** **CANCEL**

Copyright 1995-2009, AARP. All rights reserved.

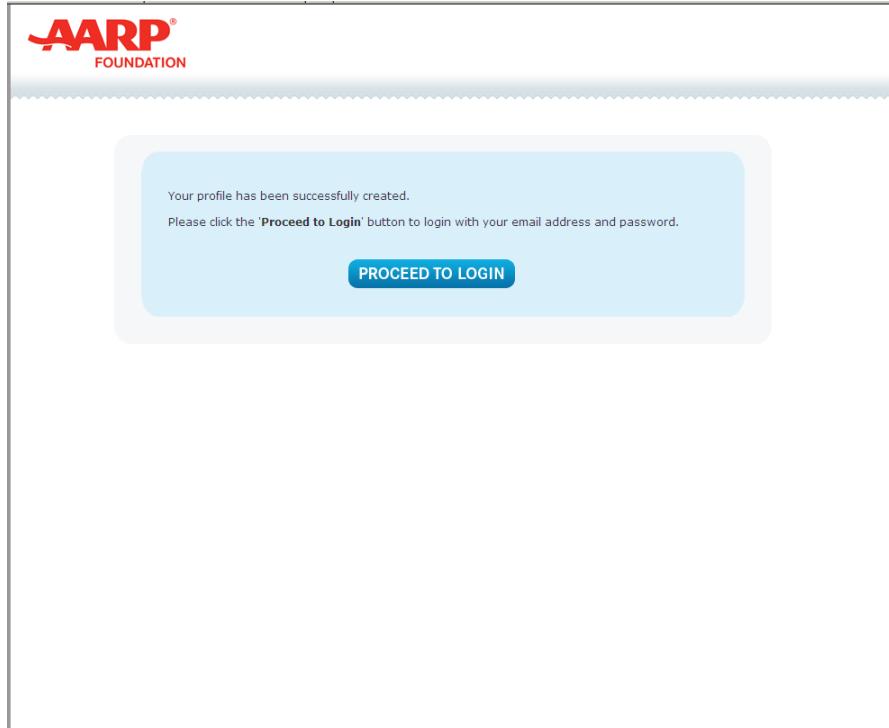
User must enter all mandatory fields to proceed and click Sign Up button when done.

**Note:** The user must be the following roles to view their recruitment application

- DC
- ADS
- PVC
- SC

Once registration is completed, the following confirmation screen (Screen 6) is shown

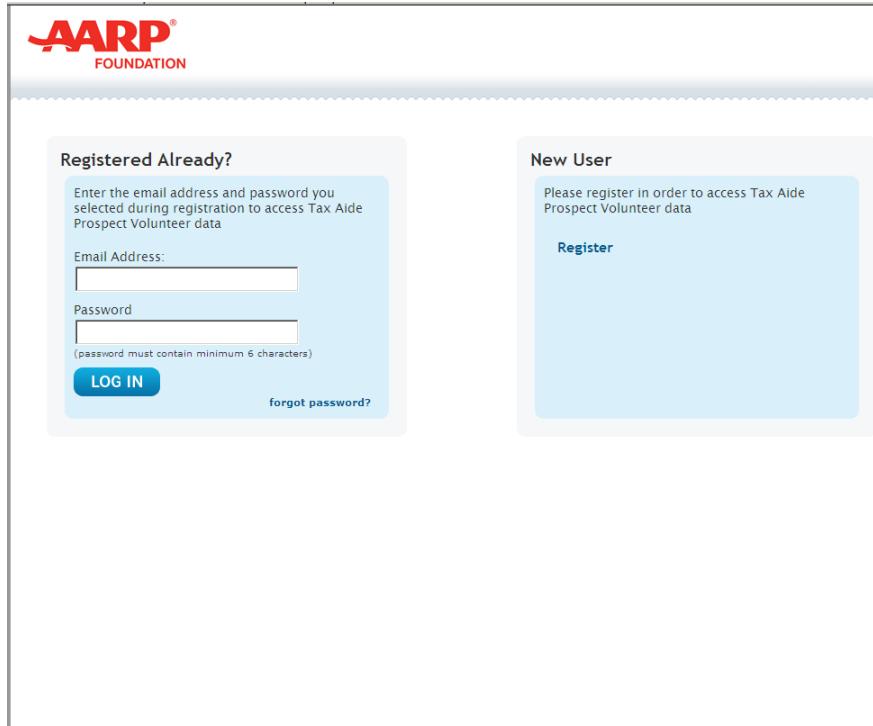
**Screen 6:**



The image shows a registration confirmation screen for the AARP Foundation. At the top, the AARP Foundation logo is displayed. Below the logo, a message box contains the text: "Your profile has been successfully created. Please click the 'Proceed to Login' button to login with your email address and password." A blue "PROCEED TO LOGIN" button is centered in the message box. The background of the page is white with a light gray horizontal bar at the top.

Clicking the “Proceed to Login” button navigates the user to the login screen (screen 7).  
Note: please use the same email address and password created in the registration process.

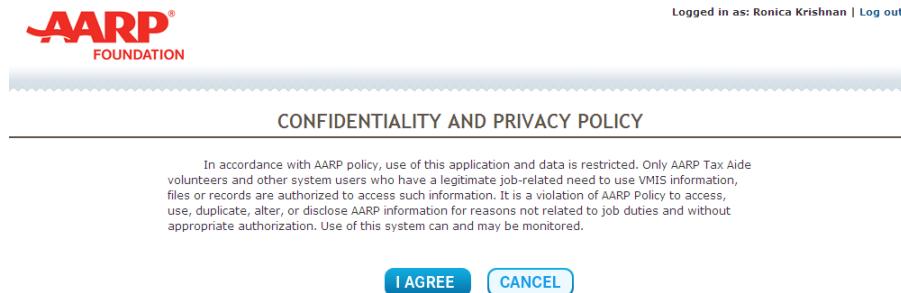
**Screen 7:**



The image shows the login screen for the AARP Foundation. At the top, the AARP Foundation logo is displayed. The screen is divided into two main sections: "Registered Already?" on the left and "New User" on the right. The "Registered Already?" section contains fields for "Email Address" and "Password", with a note that the password must be at least 6 characters. It also features a "LOG IN" button and a "forgot password?" link. The "New User" section contains a "Register" button and a note that registration is required to access Tax Aide Prospect Volunteer data. The background of the page is white with a light gray horizontal bar at the top.

Below confidentiality screen (Screen 8) is displayed once the email address and password are entered correctly from the login screen.

**Screen 8:**



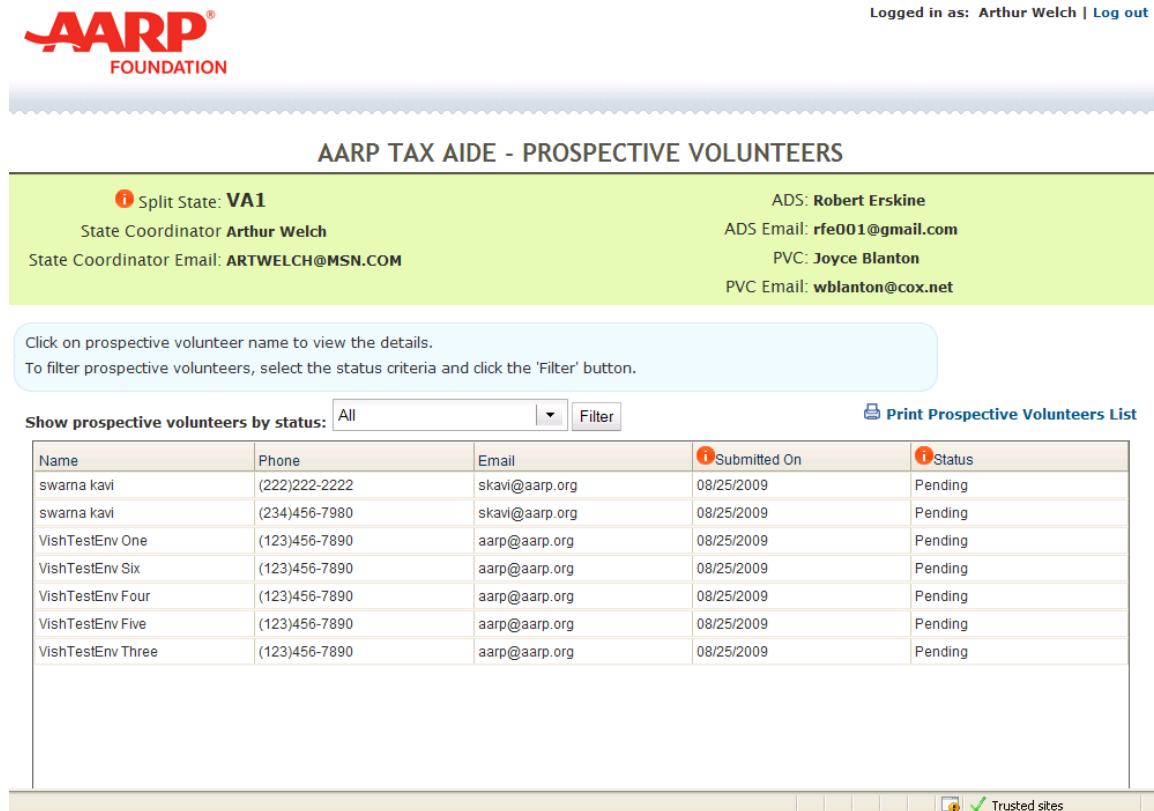
CONFIDENTIALITY AND PRIVACY POLICY

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**I AGREE**   **CANCEL**

Clicking Cancel will take the user back to the Login screen. If the user clicks on 'I Agree' the following recruitment main page (Screen 9) will be displayed:

**Screen 9:**



Logged in as: Arthur Welch | [Log out](#)

**AARP TAX AIDE - PROSPECTIVE VOLUNTEERS**

Split State: VA1

State Coordinator Arthur Welch

State Coordinator Email: ARTWELCH@MSN.COM

ADS: Robert Erskine

ADS Email: rfe001@gmail.com

PVC: Joyce Blanton

PVC Email: wblanton@cox.net

Click on prospective volunteer name to view the details.  
To filter prospective volunteers, select the status criteria and click the 'Filter' button.

Show prospective volunteers by status: All  [Print Prospective Volunteers List](#)

Name	Phone	Email	Submitted On	Status
swarna kavi	(222)222-2222	skavi@aarp.org	08/25/2009	Pending
swarna kavi	(234)456-7980	skavi@aarp.org	08/25/2009	Pending
VishTestEnv One	(123)456-7890	aarp@aarp.org	08/25/2009	Pending
VishTestEnv Six	(123)456-7890	aarp@aarp.org	08/25/2009	Pending
VishTestEnv Four	(123)456-7890	aarp@aarp.org	08/25/2009	Pending
VishTestEnv Five	(123)456-7890	aarp@aarp.org	08/25/2009	Pending
VishTestEnv Three	(123)456-7890	aarp@aarp.org	08/25/2009	Pending

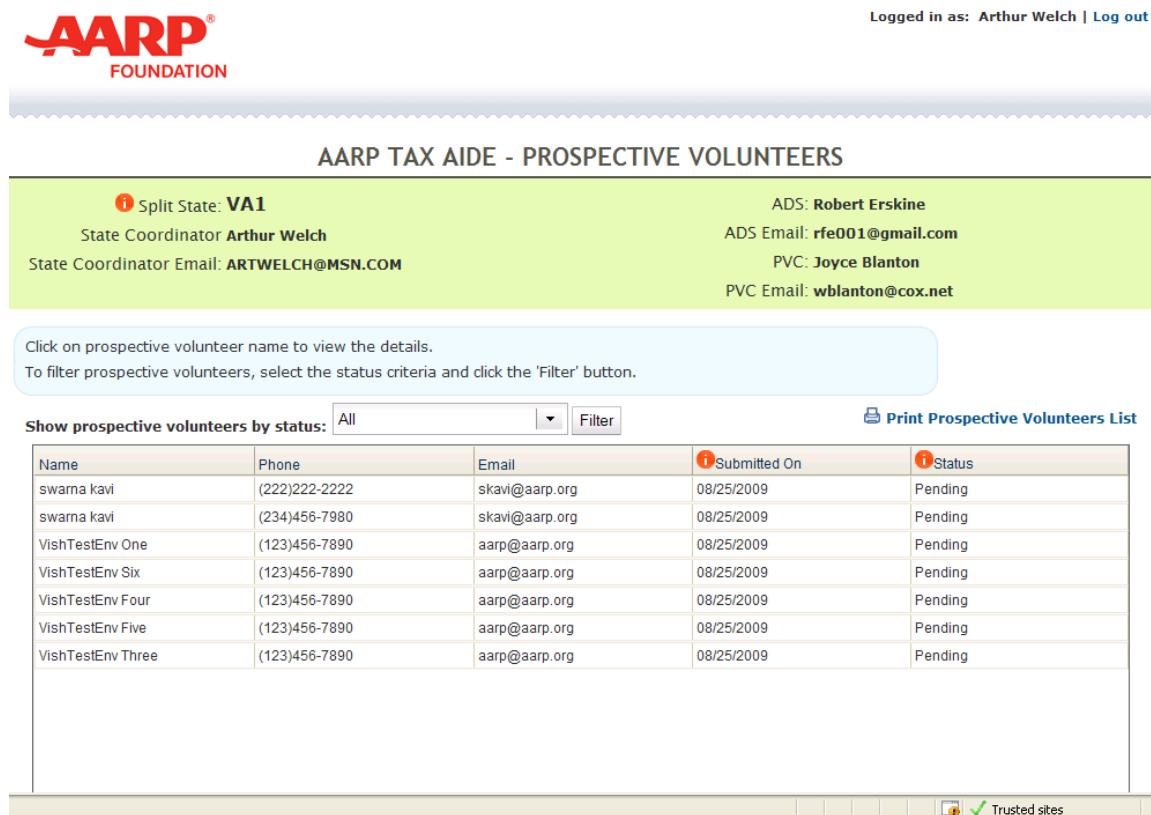
By zip-code Tax-Aide Prospective Volunteers (applicants) will be maintained in the queue of (DC/SC/PVC/ADS)

**Note:** If user has only "District Coordinator" in Tax-Aide Application then he/she will see only "Pending Approval From DC" and "In Progress" statuses of prospective volunteers in the queue.

### 3.0 Approve/Reject/On Hold/In Progress Prospective Volunteers

After successfully login to Tax-Aide Recruitment by users (DC/SC/PVC/ADS) the following recruitment main page (Screen 10) is displayed.

Screen 10:



Logged in as: Arthur Welch | [Log out](#)

**AARP TAX AIDE - PROSPECTIVE VOLUNTEERS**

Split State: VA1

State Coordinator Arthur Welch

State Coordinator Email: ARTWELCH@MSN.COM

ADS: Robert Erskine

ADS Email: rfe001@gmail.com

PVC: Joyce Blanton

PVC Email: wblanton@cox.net

Click on prospective volunteer name to view the details.  
To filter prospective volunteers, select the status criteria and click the 'Filter' button.

Show prospective volunteers by status:   [Print Prospective Volunteers List](#)

Name	Phone	Email	Submitted On	Status
swarna kavi	(222)222-2222	skavi@aarp.org	08/25/2009	Pending
swarna kavi	(234)456-7980	skavi@aarp.org	08/25/2009	Pending
VishTestEnv One	(123)456-7890	aarp@aarp.org	08/25/2009	Pending
VishTestEnv Six	(123)456-7890	aarp@aarp.org	08/25/2009	Pending
VishTestEnv Four	(123)456-7890	aarp@aarp.org	08/25/2009	Pending
VishTestEnv Five	(123)456-7890	aarp@aarp.org	08/25/2009	Pending
VishTestEnv Three	(123)456-7890	aarp@aarp.org	08/25/2009	Pending

By clicking on any existing prospective volunteer in the queue the following screen Detail prospective volunteer page (Screen 11) is displayed.

### Screen 11:



Logged in as: Arthur Welch | [Log out](#)

#### AARP TAX AIDE - PROSPECTIVE VOLUNTEERS

**Split State:** VA1 [change splitstate](#)

State Coordinator: Arthur Welch  
State Coordinator Email: ARTWELCH@MSN.COM

ADS: Robert Erskine  
ADS Email: rfe001@gmail.com  
PVC: Joyce Blanton  
PVC Email: wblanton@cox.net

**Prospect Name:** VishTestEnv Three **Age:** 0 **Phone:** (123) 456-7890 **Email:** aarp@aarp.org  
123 silk court lee st 2466 Herndon , VA - 20171

<b>Volunteer Experience</b> 12 years	<b>Personal Information</b> <b>Languages Known:</b> Greek <b>Ethnicity:</b> Asian/Pacific Islander <b>Highest level of education:</b> Less than high school <b>Current Employment Status:</b> Not Employed <b>Any disability or chronic conditions?</b> Yes <b>Any convictions of crime?</b> Yes
<b>Work Experience</b> Apple - VP	
<b>Volunteering related information</b> <b>Availability:</b> Weekends	

By selecting the DC is the dropdown list and review the prospective volunteer with any choices (approve/reject/on-hold/in-progress) the selected prospective volunteer will be approved/rejected/maintained in the queue and system will navigate user back to recruitment main page.

## 4.0 Login to VMIS (Intranet)

Login to the Tax Aide Program and proceed to the Recruitment tab. There will be two options available to the user.

- Add Prospects
- Process Prospects

Screen 12:

Screen 12: A screenshot of the AARP Tax Aide Program VMIS Intranet login screen. The page has a dark header with the AARP logo and 'Welcome AARP Tax Aide Program'. Below the header is a navigation menu with links for Home, Tax Aide Site Locator, My Report Docs (selected), Log off, Volunteers, Sites, Reports, Labels/Letters, Recruitment (selected), Help, and a link to Flat Rate Payments. The Recruitment menu is highlighted with a yellow background. On the right side, there is a sidebar with buttons for Add Prospects (selected), Process Prospects, All Volunteer Roster, Leadership Roster, IRS Download, Create Letters/Labels, and Create Mass Mailing Labels. At the bottom of the page are links for Privacy Policy, Copyrights 2005, AARP Programs, Change Password, Feedback, and System Admin.

## **5.0      Add Prospective Volunteer through VMIS**

Select the Add Prospects options from the Recruitment tab. The following screen (Screen 13)



## Welcome AARP Tax Aide Program

Home Tax Aide Site Locator My Report Docs Log off

Volunteers Sites Reports Labels/Letters Recruitment Help

### Add Prospective Volunteer

Red titled fields are required.

Honorific	First Name	Middle Name	Last Name	Suffix	Nick Name
<input type="text"/>					
Address 1:	<input type="text"/>				
Address 2:	<input type="text"/>				
Address 3:	<input type="text"/>				
City:	<input type="text"/>				
State:	<input type="text"/>				
Zip Code:	<input type="text"/>				

Phone:  -  -  Ext.

Email:

### show Additional Prospective Volunteer Information

How can we best contact you? (max. 500 characters)

How did you learn about program?

Have you ever completed your own or someone else's tax return?

How comfortable are you using a computer?

Please tell us about your previous Volunteer experience/positions held? (max. 500 characters)

Please list your previous employers and job title

Name of the Employer	Job Title	<input type="button" value="add"/>
<input type="text"/>	<input type="text"/>	<input type="button" value="add"/>

Are you fluent in any language other than English?

When could you be available for help?

Weekdays  Evenings  Weekends

What is your year of birth?  (yyyy)

What is your ethnicity?

American Indian or Alaskan Native  Asian/Pacific Islander  Black or African American  White/Caucasian  Hispanic/Latino

Other

What is the highest level of education you have completed?

What is your current employment status?

Do you have any disability or chronic condition that keeps you from fully participating in work, school, house work or other activities?

In the last 10 years, have you been convicted of a crime? (A yes is not an automatic disqualification)

Anything else you would like us to know? (max. 500 characters)

The Add prospective volunteer screen will display. User must enter all mandatory fields marked in red. Note that more field options will be displayed when the **Show Additional Prospective Volunteer Information** link is selected. When done, click the Submit button.

Once the prospect is added, a prompt will be displayed on the Add Prospect Volunteer screen (Screen 14).

**Screen 14:**

Successfully added prospect volunteer: sonia khurana.

## 6.0 Process Prospective Volunteers

Select the Recruitment – Process prospects tab

### Screen 15:

Process Prospective Volunteer - Search

<b>Prospect Information</b> Please enter 'First Name, Last Name' <b>OR</b> 'Zip Code' <b>OR</b> 'Split State'  First Name: <input type="text"/> Last Name: <input type="text"/> Zip Code: <input type="text"/> Split State: <input type="text"/>	<b>District Coordinator Information</b> Please enter 'First Name, Last Name, Email' <b>OR</b> 'District Coordinator ID'  District Coordinator First Name: <input type="text"/> District Coordinator Last Name: <input type="text"/> District Coordinator Email: <input type="text"/> District Coordinator ID: <input type="text"/>
<b>Search</b>	

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User can enter prospective volunteer information or district coordinator information to search for approved Prospective volunteers

Upon clicking “Search” approved prospective volunteers will be displayed.

If the “prospective volunteer” is in Konnects or VMIS database system will display the prospective volunteers list as shown in the below screen (Screen 16) **Screen 16:**

**Welcome AARP Tax Aide Program**

Home Tax Aide Site Locator My Report Docs Log off

Volunteers Sites Reports Labels/Letters Recruitment Help

**Search Results**

Page 1 of 1 Previous | Next | First | Last

Go To Page  Add a Person

2 volunteers found.  
Aaron Doe  
ASHBURN, VA

ID	Name/Address	Seasonal Address
500049935	Aaron Doe 234 VMIS Rec Ter ASHBURN, VA 20147	234 VMIS Rec Ter VIENNA, VA 22182
500049941	Aaron Doe Jr. 1234 Brisbane Cir ASHBURN, VA 20147	26 Mills Rd VIENNA, VA 22182

2 volunteers found.  Go To Page  Add a Person

Page 1 of 1 Previous | Next | First | Last

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User can click on existing volunteer to update profile information or system will allow adding another volunteer even First name and Last name is same by clicking on Add Volunteer button.

### Screen 17:

**AARP** **Welcome**  
**AARP Tax Aide Program**

Home Tax Aide Site Locator My Report Docs Log off

Volunteers Sites Reports Labels/Letters Recruitment Help

Search Results Save Reset

Add New Volunteer/Assignments Edit Volunteer & Assignment Information Edit Volunteer/Assignments

VishTest02 Jeo  
\* 204 LEE ST  
GAITHERSBURG, MD 20877-2947

Volunteer ID: 50-012-2930  
Supervisor Name: ID: 111111111  
Split-State Code: MD1  
<<In KONNEX but not a Member>>

\* Tax-Aide Address

Red titled fields are required.

Honorific: Windows Internet Explorer

Middle Name:  Information has been updated

Supervisor ID:

Inactive:

First Name: VishTest02 Nick Name:   
Last Name: Jeo Suffix:

Tax-Aide Start Year: 2010

Reason for Inactive: Status:

**Address Information** Add Address

Start and End dates are required for Seasonal addresses.

Address Type: MAILING  Tax Aide Address

Address: 204 LEE ST

Zip Code: 20877  County: Montgomery County   
City: GAITHERSBURG State: Maryland  District:  Split-State Code: MD1

Start Date:  e.g. mm/dd/yyyy End Date:  e.g. mm/dd/yyyy

Done  100%

Once approved Prospective Volunteer has been processed the volunteer ID will be provided in the popup message.